Chief Information Officer's IT Portfolio Review

Office of Chief Financial Officer

November 21, 2016

Agenda

- Status of action items from previous IT Portfolio Review
- OCFO's FY17-18 IT/IM Strategic Initiatives
- System interfaces
- CPIC investment details (budget and technical target)
- READ completion
- Projected IT acquisitions
- Lotus Notes migration status
- Data Center consolidation & optimization status
- Updates on OEI Services
- OCFO's support needs from OEI
- Changes to IT Acquisition Approval Process

Status of action items from previous IT Portfolio Review

#	Action	Status
1	Elena Larsen to meet with Kimberly Dubbs to plan an architecture discussion between OCFO and OEI architecture staff to ensure OCFO's architecture is developed to facilitate decision making.	**Open**
2	Elena Larsen to work with Kimberly Dubbs to calendar a meeting with the BFS team, Greg Godbout, Robin Gonzalez, and Tim Thorpe concerning lessons learned with Azure.	**Closed**
3	Kimberly Dubbs to contact Elena Larsen to calendar a meeting with appropriate parties to discuss OIG security requirements for OCFO and Azure.	**Closed**
4	Elena Larsen to work with Kimberly Dubbs to coordinate a meeting with NCC on disaster recovery	**Open**. Contingent on COMPASS recompete, per FinRS business case)
5	Elena Larsen to work with Kimberly Dubbs on OCFO spend plan and arrange for any necessary FITARA reviews, e.g., BFS, e-Enterprise Portal.	**Open**. OEI and OCFO to establish a calendar of 2017 IT service acquisitions.
6	OCFO to use the Exhibit 200 process to examine systems currently showing 100% O&M to determine whether there are any DME activities that should be recoded.	**Closed**
7	When SI alternatives analysis is complete, submit a copy to Elena Larsen to be routed for review within OEI.	**Closed**
8	Elena Larsen to meet with Kimberly Dubbs to clarify areas of support requested from OEI and set up follow-on meetings.	**Closed**
9	OEI to confer with IMO community on next steps with READ, including defining criteria for what items should be included in READ, which data fields are required, and possible development of an API. Final criteria will be published on the READ intranet site.	**Closed**
10	OEI to schedule review of the OCFO READ portfolio	**Open**. To be completed in 2017.

Registry of EPA Applications and Databases

of OCFO READ Records/ Total # of READ records*: 18/1022 (1.8%)

*Data excludes Models and Terminated records.

- % of OCFO READ records that completed certain required fields

Name of field required for all READ records	% of OCFO READ records that completed the field*
Submit (date stamp is June 2016 or later)	67%
Authentication required of end users?	61%
Interfaces with other information resources	61%

Registry of EPA Applications and Databases

- List of OCFO application and database records in READ (slide 1 of 2)

Acronym	Name	Description	CPIC Type
BAS	Budget Automation System	BAS is the central Agency system used to integrate strategic planning, annual planning, budgeting and financial management. BAS contains resource (dollars and FTE), planning and performance data.	Medium
BFS	Budget Formulation System	BFS will provide an integrated budgeting, planning and performance management system for the entire Agency.	Medium
CBOR	Compass Business Objects Reporting	The tool provides enterprise-wide, web-based access to information, which is designed to integrate EPA financial, budget, administrative and program performance information.	N/A
CDW	Compass Data Ware	The OCFO developed the Compass Data Warehouse (CDW) component of Compass Financials to consolidate financial data from various enterprise systems into a single relational database	N/A
CGE	Concur	Concur Government Edition (CGE) is a shared E-Travel Program Management Office web-based Travel Service maintained by Concur Technologies. It provides Travel Services for all EPA employees.	N/A
Compass	Compass	Compass Financials is a web application developed by CGI Federal Inc. It provides the tools needed to effectively manage, budget and track expenditures.	Major
CSA	Conference Spending	The Conference Spending Approval Tool creates automated reporting of EPA Form 5170, and fulfills the requirements of OMB M-12-12 and the Deputy Administrator's May 23, 2012 memorandum.	N/A
E-E Portal	E-Enterprise Portal	The E-Enterprise Portal platform will provide a consolidated entry point for businesses and citizens efficiently locate, obtain access to, and interact with relevant EPA, State and Tribal environmental services.	Medium
ERC	ERC	The Executive Resource Center (ERC) will provide Executives with near-real time financial/mixed financial data in a graphic format.	N/A
FeedMom	FeedMom	FeedMom, which stands for Feed Momentum, is an application programming interface	N/A
FMIFIA	Federal Managers Financial Integrit	The Federal Managers Financial Integrity Act (FMFIA) is an automated reporting tool which is used by the program offices to evaluate and report on internal controls and accounting systems	N/A

Registry of EPA Applications and Databases

- List of OCFO application and database records in READ (slide 2 of 2)

Acronym	Name	Description	CPIC Type
GLADR	GovTrip Legacy Access Database Retr	User Interface tool for searching and retrieving GovTrip legacy data as well as linking the data to the receipts.	N/A
HHS-AFPS	Accounting for Pay System	HHS employee payroll information.	N/A
MATS	Management Audit Tracking System	This system tracks audits issued by EPA's OIG that require follow-up action.	N/A
mLINQs	MoveLINQs	Permanent Change of Station (PCS) management system.	N/A
OARF	On Line Access Request Form	The Compass Access Request form is a web based application designed with automated approval workflow to allow users to submit access requests for Compass Financials, and Compass Business Objects Reports.	N/A
OCFO-PTS	PTS	The Payment Tracking System (PTS) is a suite of applications that support the timely and accurate processing of EPA financial payments.	N/A
PPL	PeoplePlus	PeoplePlus (PPL) is the U.S. Environmental Protection Agency's (EPA) time & labor system which feeds the EPA's payroll function maintained by the Interior Business Center (IBC).	N/A
PMS	Payment Management System	Provides workflow activities that support making payments in EPA’s core financial system.	**Lite**
sbm	Serena Business Manager	Manages issue and defect tracking, incident management, change request management, and release management throughout the system life cycle. SBM interfaces with both PVCS and Requirement Management Dimension.	N/A
SCORPIOS	SCORPIOS	SCORPIOS is used to organize cost information and produce reports that summarize the costs for a specific Superfund or Oil site.	Lite
SPVCSVM	Serena PVCS Version Manager	A repository that tracks and provides control over changes to source code for each individual application. It also manages revisions, maintains documentation and configuration files as well as source code.	N/A
ULO	ULO	The application will be used as a one-stop shopping tool to assist in the review and certification of unliquidated obligations (ULO) for grants, contracts, interagency agreements, travel and miscellaneous obligations.	N/A

Projected IT acquisitions

Item	[redacted]	[redacted]	FITARA Review meeting
MOBIS (EN and EE facilitation)	[redacted]	[redacted]	
Licenses and development for e-Reporting PaaS	[redacted]	[redacted]	
Consideration of CASE tools as part of the EA Standards Profile and Agile Development BPA	[redacted]	[redacted]	
BAS/BFS Contract	[redacted]	[redacted]	Scheduled for Nov. 28, 2016
Compass Re-compete	[redacted]	[redacted]	July 2015

Lotus Notes migration status

	Lotus Notes applications/ databases	Nov. 1, 2016
	Total # with CBI and PII data	0 with CBI 34 with PII
	No Plan	0
Lit	Total # Subject to Litigation Hold	0
Archive	Total # to Archive	62
	Archive in process	0
	Flagged for Archive but then Deleted	0
	Total # Moved to Archive Server	62
	% Complete Archive	100
Delete	Total # to Delete	170
	Total # Deleted	168
	% Complete Deletion	99
Migrate	Total # Apps to be migrated	40
	Total # Mailboxes to be migrated	2
	Migration Complete	0

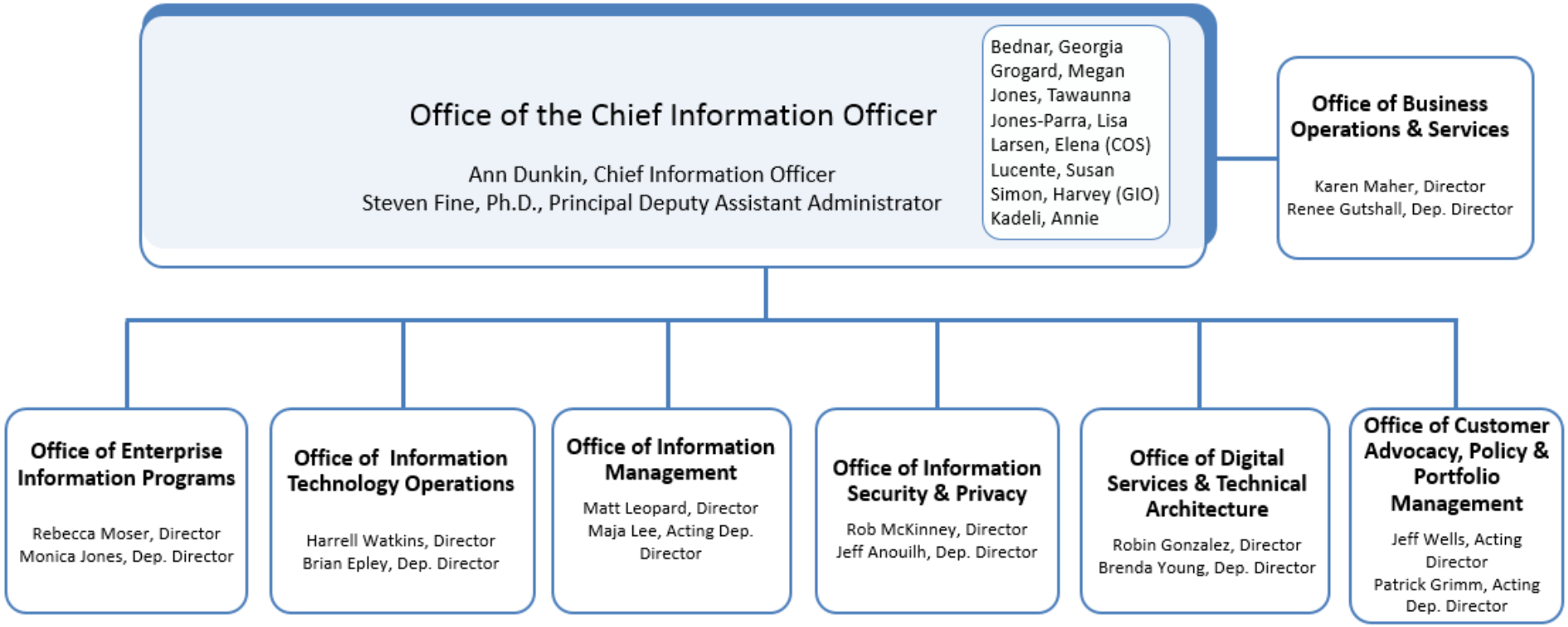
Data Center Consolidation & Optimization

- Discussion topic: OCFO Las Vegas La Plaza computer room

Office of Environmental Information updates

- OEI Reorganization
- OCFO's support needs from OEI
- New shared IT/IM Contracts, Licenses, and Services
- Cloud services
- Continuous Diagnostics and Mitigation
- eDiscovery and Records and Content Management
- Geospatial Workforce Analysis
- EPA's Enterprise Digital Analytics
- Changes to IT Acquisition Approval Process

OEI reorganization



OEI IT Service Directory:
http://intranet.epa.gov/oei/about/pdfs/oei_it_service_directory_v1.0_july_2016_508_072116.pdf

Customer information hub for the OEI reorganization:
https://usepa.sharepoint.com/sites/oei_Work/oei.re.alignment/SitePages/Customer%20Information%20Hub.aspx

OEI org chart: http://intranet.epa.gov/oei/about/orgchart.htm

OCFO's support needs from OEI

- Dependencies on OEI services: NCC hosting, CDX, System of Registries
- General need for OEI to publish shared services catalog. Also need corresponding planning and support to integrate those shared services with the developers of applications for mission services. Relationship to Digital Services Playbook
- Joint governance around the development and operations of the E-Enterprise Portal. Roles and responsibilities.
- Transition strategy for CDX and other Shared Services to the E-Enterprise Portal.
- Budget coordination and transparency for mapping F1 Program Project activities and E-Enterprise projects
- Enhanced communication around CDW quarterly ceilings and impacts to ongoing projects

New shared IT/IM Contracts, Licenses, and Services

Name	Summary	Date Available	Link or POC
Interagency Agreement with GSA's Assisted Acquisition Services	Business Automation Platform (Software platform for rapid development and deployment of business operations applications, including forms and workflow)	FY17 (TBD)	Timothy Hinds
	Agile Acquisition Service (includes Agile Support Services, Agile Lifecycle Management Services, and Application Development Services)	FY17 (TBD)	Judy Jackson
	Agile Development Tools (Pivotal Cloud Foundry)	FY17 (TBD)	Dalroy Ward
	Cloud Software Development and Management Tools (e.g. Atlassian, Jira, Confluence, Bitbucket, GitHub) and Kanban Project Management Environment (e.g. Trello)	FY17 (TBD)	Michelle Ibarra
Salesforce BPA	A multiple-award, government wide BPA that consolidates the government's Salesforce technical development, O&M, and implementation strategy requirements into one procurement vehicle.	Now	Information page on GSA site
Innovation Fellowship	The EPA Innovation Fellowship Program recruits, qualifies, and hires cutting-edge experienced technologists into EPA as term-limited federal employees. Positions: Digital services analysts, technical product leads, developers, and user centered design.	Now	Phyllis Donahue
National Quality Assurance System	An enterprise quality assurance management system to link the EPA Quality Community together and provide the CIO with real-time status on the state of EPA quality programs.	Award & configure FY17 Q3. Use FY18 Q1.	Robert Tallent
Qlik Sense	Data visualization application. This web-based software application is available for all EPA employees.	Now	Information and log-in
Managed Print Services	Scope: Fleet assessment, maintenance support services, right-sizing, optimization, break/fix services.	FY17 Q2 award date	Dawn Brown, Tommie Madison
Virtual Desktop Infrastructure (VDI)	WCF subscription service providing 2500 concurrent virtual desktops for Agency use.	Service to begin 2nd half of FY17	Larry McMillan, Richard Than
Lotus Notes Export Utility	Tool to enable data export from any Lotus Notes database into a variety of formats (pdf, HTML, MS Excel, MS Word, CSV, XML, etc.)	Now	AgeCom tool
Microsoft Enterprise License Agreement	Access to all Microsoft products excluding hardware. Average discount of 49% off of GSA Schedule.	Now	Details
Desktop and Laptop purchases	Desktops and laptops should be purchased through any of 3 specific government-wide contracts.	Now	OMB M-16-02

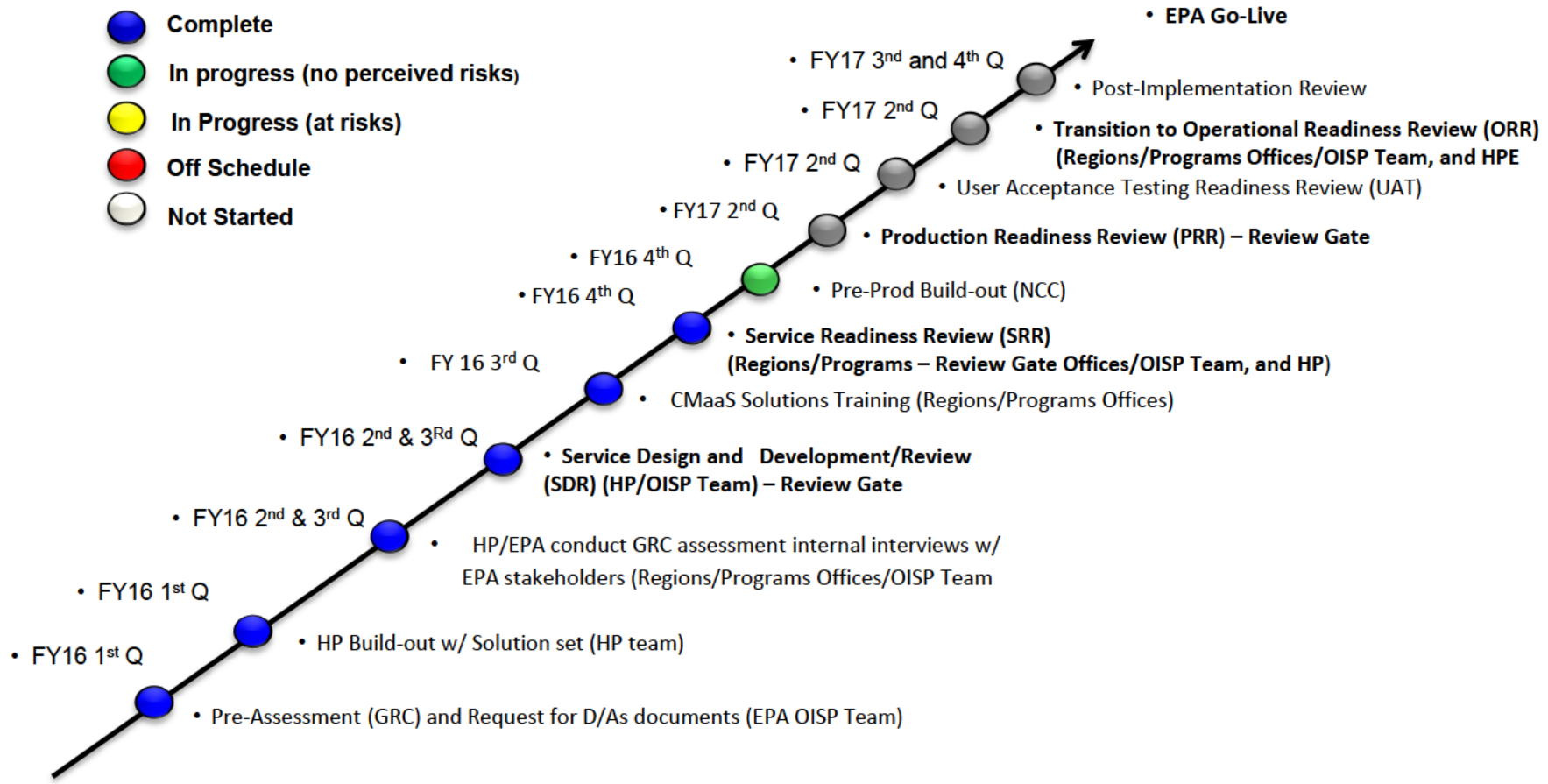
EPA's IaaS and PaaS Cloud Services

- Currently available:
  - Pre-Production Developers' "Sandbox" in Cloud.gov – PIV card authentication enabled
  - "Big Data" analytics in Amazon Web Services – for initial testing
  - Application "cloud readiness" assessment

- Available soon:
  - Application development & deployment platforms in Microsoft Azure and Cloud.gov
  - Production Analytics Platform in AWS
  - Initial "Minimum Viable Product" (MVP) implementation late Q1/early Q2 CY17
  - Incremental enhancements thereafter

- Target: Unified application placement and hosting services
  - Provide Cloud and on-premise (NCC) hosting services under single services portfolio
  - Apps, data to be placed optimally in accordance with their characteristics and requirements
  - Cloud services brokerage

Continuous Diagnostics and Mitigation Activities



eDiscovery and Records and Content Management

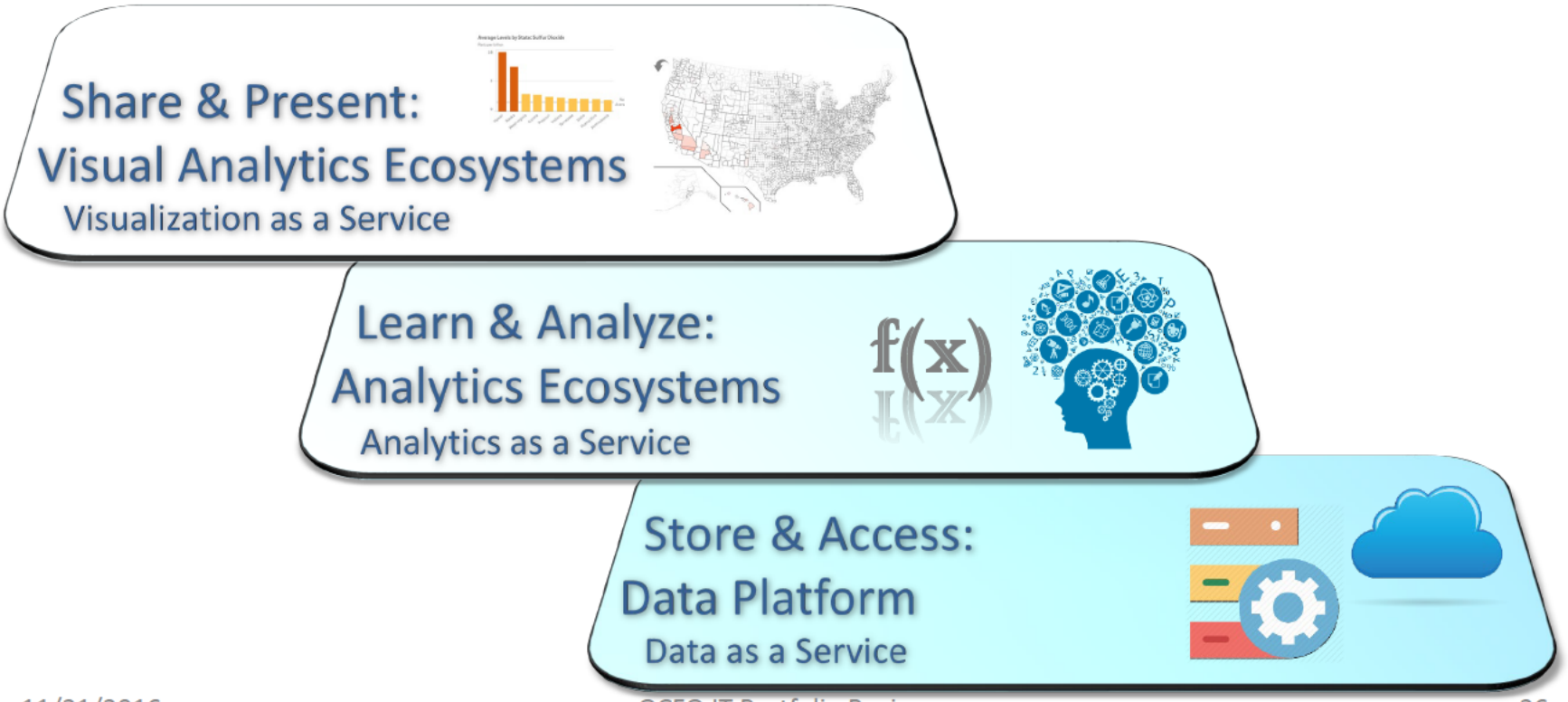
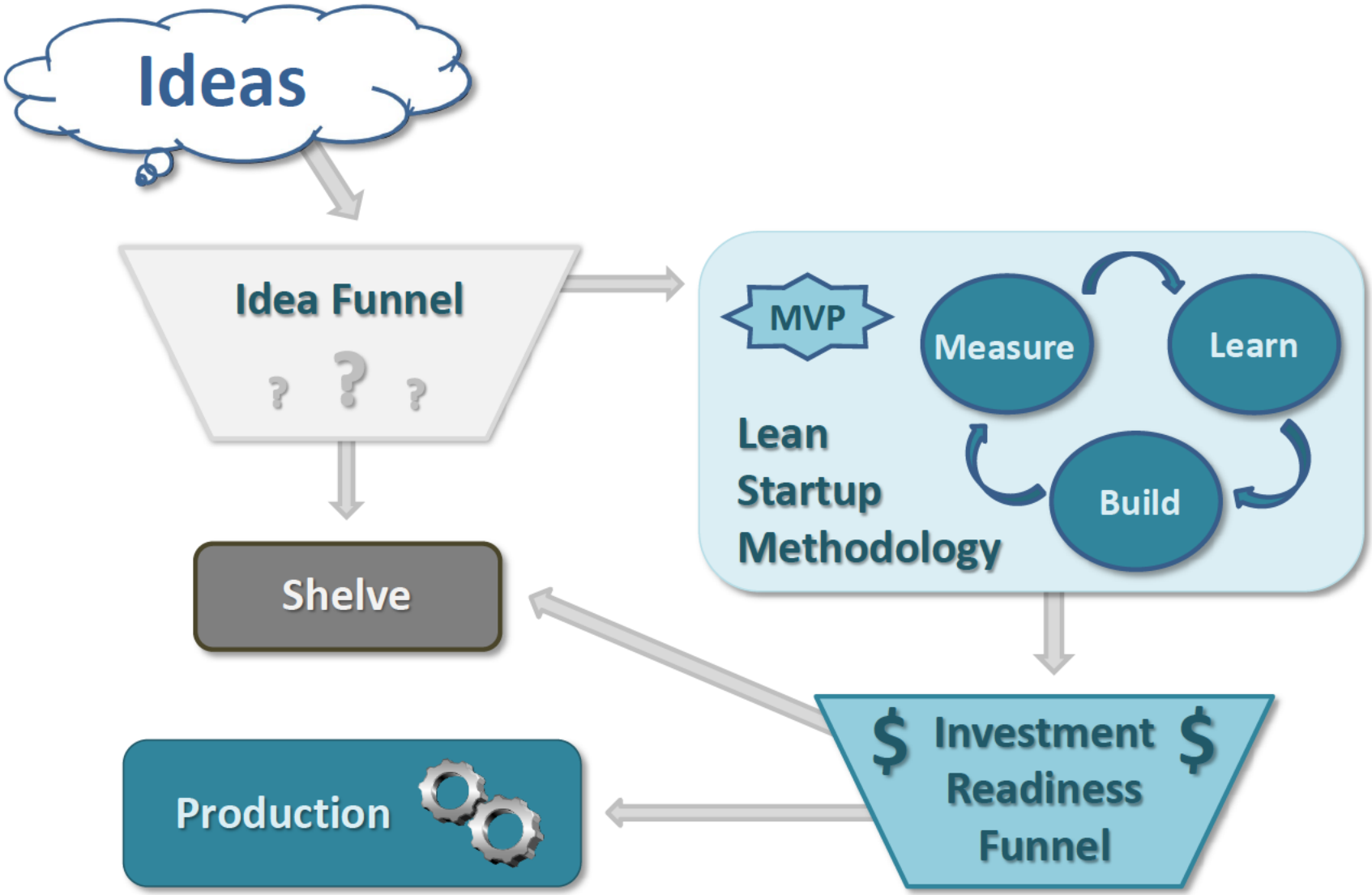
- **eDiscovery and Records and Content Management Alternatives Analysis Report**
  - Provided technology recommendations as well as recommendations aimed at enhancing the staffing models and business processes that are wrapped around the technology.
  - eDiscovery Division management will be developing a roadmap for Discovery Services taking into consideration recommendations made in the Alternatives Analysis.
- **Future of Records and Content Management**
  - Automating Email Records Management
  - EZ Desktop Records tool
  - SharePoint Records Centers
  - Cloud-based infrastructure
  - Digitization of existing paper records and electronic access to those records

Geospatial Workforce Analysis

- Background:
  - Analysis of how geospatial support is organized and resourced
    - Meetings and surveys of Regions and Programs to assess:
      - Support levels and organizational arrangements
      - Strengths and weaknesses
  - Propose options for ensuring critical baseline of support to:
    - Meet local office user support needs
    - Provide coordination on stewardship of GeoPlatform, EDG and FRS
- Status:
  - Survey distributed April 29, 2016
  - Interviews in progress
    - GIS Coordinators assist with staff and manager interviews
    - Region 7 complete; all other Regions scheduled through early fall

EPA's Enterprise Digital Analytics: Program Vision

We will responsibly unlock the power of EPA data to protect human health & the environment through data-driven decision making, and reduce barriers for the public & other agencies to access our data.



EPA's Enterprise Digital Analytics: How We Work Within the Agency